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Guide for
Private School
Authority Planning
and Reporting

December 1998



Alberta

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Note: Throughout the document, the use of the term "private school" means private school authority. This guide applies only to funded, accredited private schools that provide a complete elementary, junior high and/or senior high school program.

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OVERVIEW - ACCOUNTABILITY IN EDUCATION

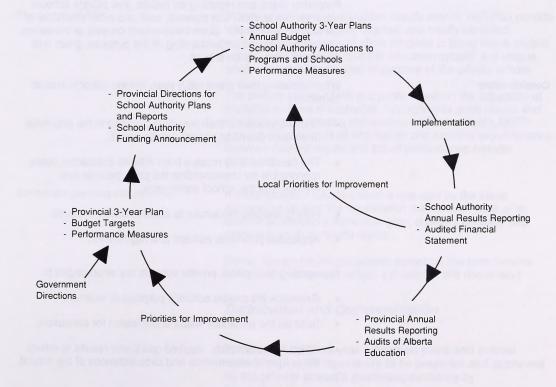
Introduction

Private school education plans and results reports are public accountability documents within Alberta's results-focused education system. Your school's plan identifies the results you want to achieve for each goal, the actions you will implement, and the measures you will use to assess and report on progress and achievement. These plans and results reports guide decision making and improve education in your school.

Purpose of guide

This guide outlines the provincial requirements for private school authority three-year education plans and annual education results reports. These requirements are consistent with the recommendations of the Private Schools Funding Task Force. The provincial authority for these requirements is the School Authority Accountability Policy, *Policy Regulations and Forms Manual*, Alberta Education, April 1997.

Accountability Cycle for Alberta's Education System



Relationship to provincial directions for education

Planning and reporting for private schools take place in the context of government's three-year plan for education and other provincial directions for Alberta's education system.

Alberta Education has identified a core set of goals, results, performance measures and priorities for improvement from the provincial three-year plan for education that private schools include in their updated three-year education plans and report on in their annual results report. This enables private schools to address their mission, needs and priorities while ensuring their plans are consistent with provincial directions for education.

Private School Planning and Reporting

Purpose of planning and reporting

Private school three-year education plans and reports on results achieved are key to achieving the school's mission and goals, ensuring resources are put to good use, and enhancing communication and accountability, in addition to meeting government requirements.

Preparing plans and reporting on results give private schools opportunities to work with parents, staff and other members of the school community. Such involvement creates or increases commitment to and understanding of the purpose, goals and priorities of the private school.

Considerations

When updating their plans each year, private schools should consider:

- The information in their results report and in the provincial three-year plan and annual results report.
- The feedback they receive from Alberta Education, those responsible for implementing the plan, parents and members of the school community.
- How to allocate resources to achieve desired results.
- Applicable provincial policies and regulations.

In preparing their plans, private schools are encouraged to:

- Reinforce the private school's purpose or mission.
- Build on the provincial vision and mission for education.
- Adapt the provincially required goals and results to reflect the unique characteristics and circumstances of the school.

- Include other goals, results, performance measures, and strategies that reflect the school's purpose, needs, and circumstances.
- Use the planning process as an opportunity to consult with parents, parent groups, staff and other members of the school community.

Three-year time frame

The private school education plan maintains a three-year time frame. The plan is reviewed and adjusted annually, based on recent experience. As one plan year is completed another plan year is added, rolling the plan forward. It should be unnecessary to rework the plan entirely each year except in unusual circumstances.

Implementation and reporting

Private schools are responsible for carrying out their education plans and reporting annually to parents and other members of their school community on results achieved following the completion of each school year.

Purpose of AERRs

Private school annual education results reports (AERRs) provide information on provincially required and locally identified performance measures to show progress is being made toward achieving common goals of the education system and unique goals related to the mission or purpose of the private school.

The private school AERR is a public report on the education of students and use of resources that highlights good results and identifies areas needing improvement. Your school's AERR also provides contextual information and explains any difference between desired results and actual performance (results achieved).

School site planning and reporting

If more than one private school is operated by the same authority or society, the organization may require each of its schools to develop a three-year plan, update it annually and prepare an annual results report.

[Note: Except for the preceeding sentence, the term "private school" means "private school authority" in this document.]

Distribution and Communication

Private school three-year education plans and annual education results reports are to be prepared and approved by the private school's governing authority by November 30.

Your school's plan must be on file and available for department managers, parents and members of the school community to review in the school. Please complete the "Three-Year Education Plan Declaration Form" and the "AERR Summary Form" (provided under separate cover) and send to:

Director Regional Office Branch 11160 Jasper Avenue 3rd Floor West Edmonton, Alberta T5K 0L2

The key people responsible for implementing the plan as well as parent groups will need copies. Private schools may wish to provide highlights of the plan to parents and other members of the school's community.

[Note: During 1998/1999 Alberta Education will discuss with AISCA and private school representatives the feasibility of changing the deadline for updating the three-year plan and the Intent to Operate to May 31 starting in 1999. The deadline for private school AERRs will continue to be November 30.]

Provincial Monitoring and Feedback

Purpose of provincial monitoring

Alberta Education monitors private school plans and results reports to ensure that

- · plans:
 - are aligned with provincial directions for education,
 - are developed using results information,
 - include the required goals, results and performance measures.
 - address provincial priorities for improvement,
 - include locally-developed strategies, and
- reports:
 - include information on the required performance measures, and
 - identify improvement areas.

Alberta Education provides feedback to private schools on their education plans and results reports but does not review plans and reports for writing style, format, or level of staff, parent or community involvement in planning and reporting.

THREE-YEAR EDUCATION PLANS

Elements

Inter-relationship of plan components

The elements of the private school three-year education plan are inter-related. The private school uses information about its current situation (mission, beliefs, profile, issues and trends, current performance levels) to help determine where the private school would like to be (vision, goals, results), how achievement of results will be assessed (performance measures and targets), what actions will be taken (strategies), and how resources will be allocated (budget) to achieve the desired goals.

The elements to be included in the private school three-year education plan are listed and explained below.

Statement of Responsibility

- Confirms that the private school plan was developed in accordance with legislative authority and government requirements.
- Indicates the commitment of the private school to achieve the goals and results contained within the plan.
- Is signed by the chairman of the private school authority.
- See Appendix 4, page 27, for sample statement of responsibility for private school plans.

Vision

New vision statement for Alberta's education system:

Alberta's young people are the best educated in the country, able to achieve their individual potential, create a positive future for themselves, their families and their communities, and contribute to Alberta's prosperity and superior quality of life.

- A description of the fundamental characteristics of education that the private school is committed to achieving.
- Is consistent with the provincial vision for education.
- Describes what the private school intends to become, what your students will have achieved, and what services and programs will be like over the longer term.
- An ideal to strive for; sometimes called a preferred future.

New mission for Alberta's education system:

To ensure that all Alberta students have the opportunity to acquire the knowledge, skills and attitudes needed to be selfreliant, responsible, caring and contributing members of society.

Principles for Alberta's education system:

- · access to quality education
- equity
- flexibility
- responsiveness
- accountability

Mission

- Clearly and concisely states school's purpose, focusing on students.
- Gives focus to all the programs and services the school provides for students.
- Is consistent with the provincial mission for the education system.

Principles and/or Beliefs

- Reflect the values of the private school.
- Serve to guide all decision making and assist in the development of the mission, vision, and goals.
- Should be consistent with the principles for the provincial education system.

Profile, Issues and Trends (new requirement)

- The profile is a brief description of the school; it overviews
 the characteristics of the school, the students, and the
 community it serves (e.g., size of student body, grades and
 programs offered, special purpose or focus of the school).
- Issues are existing or emerging conditions or situations which, if left unaddressed, could interfere with the ability to fulfill your mandate or achieve your goals.
- Issues are addressed in strategies in the private school plan.
- Trends are directions of data established over time that:
 - show increases, decreases, or no change (e.g., enrolments, student achievement),
 - need to be taken into account in planning and budgeting, and
 - present three years' worth of data as the minimum.
 Five years' worth of trend data is a manageable amount to report and use.
- Note: Issues and trends should be clearly distinguished from each other in the plan.

Required provincial priorities for improvement:

- Improving co-ordination of services for children (applies to designated special education private schools and to others with special needs children starting in 1999).
- Increasing high school completion rates (applies to private schools offering secondary programs).
- Improving secondary student achievement in mathematics (applies to private schools offering secondary programs).
- Improving access to information technology (new requirement; applies to all private schools).

Note: these provincial priorities for improvement are reviewed annually and are subject to change.

Priority Areas for Improvement and Funded Initiatives

Provincial and local priority areas for improvement are identified from performance measures information.

In addition to listing their priorities for improvement, private school plans must include strategies within appropriate goals:

- To address improvement areas which have been identified from their annual education results reports;
- To address four provincial priority areas for improvement (see left column);
- To enable specific groups of students (as applicable) to achieve provincial learning expectations (new requirement):
 - students with special needs (mild, moderate, severe, gifted) as defined by Alberta Education,
 - home education students,
 - students at risk of falling behind (e.g., disadvantaged students, students whose first language is other than the school's language of instruction).

Provincial investment funding is provided over the next three years to help private schools address the provincial priority areas for improvement and meet the needs of specific groups of students (see *Funding Manual for School Authorities in the 1998/1999 School Year, Sections 3.1, 3.2 and 3.7*).

- New initiative:
 - Early Literacy Initiative.
- Continuing initiatives:
 - Special education (basic instruction funding includes funds to support programs for students with mild or moderate special needs, including those who are gifted and talented; private schools now are also required to report to the department on expenditures and progress for students with mild or moderate special needs),
 - Resident Students of Government (initiative now discontinued but grandfathered for students enrolled in private schools as resident students of the government in 1997/1998),
 - Institutional Programs (new for private school authorities operating education programs within approved institutions), and
 - Home Education (new condition to pro-rate funding for "blended" students).

Required provincial goals for private school plans:

- Education is focused on what students need to learn, and students achieve high standards.
- Education in Alberta is responsive to students, parents and communities (new requirement).
- Students have access to the support services they require (required for designated special education private schools, optional for other private schools).

[Note: Alberta Education, AISCA and private school representatives will work together during 1998/1999 to adapt this goal for private schools so that all private schools with students with special needs can include this goal starting with the 1999 update of their plan.]

- Teaching in Alberta consistently is of high quality.
- Information technology is integrated into education to enhance student learning, and increase efficiency and flexibility of delivery.
- The education system is open and accountable for the achievement of results and use of resources.

Goals

- Improvements to work toward over the long term in order to realize the school's vision and fulfill its responsibilities.
- Goals are developed to establish direction for the school and change little over time.
- Required provincial goals (see left column) may be restated to reflect your school's perspective; rewording of a required goal should retain its original intent.
- Other goals to address local needs and circumstances, as determined by the private school and its community, may be included in the plan.

Results

- Answer the question, "What will this look like when we get to where we want to be?"
- Are expressions in the present tense of expected or desired outcome, e.g., "students achieve...", "teachers use...".
- Required results (see pages 11-14) may be restated to reflect local needs and conditions; rewording of a required result should retain its original intent.
- Private schools must include at least one result for each local goal.
- Private schools may develop results additional to those that are required for provincial goals.

Performance Measures

- Provide information for assessing and reporting on progress toward achieving goals and results.
- Provide information to improve education, enhance accountability and increase public understanding of how well the school is performing.
- Are expressed in quantifiable terms, e.g., "number of...", "percentage of ...".
- The set of required provincial measures (see pages 20-21) must be included in private school plans and reported on in private school AERRs.
- Private schools must include performance measures for any optional provincial or local results in their plans.
- (See Appendix 3, page 26, for more information about developing performance measures).

Targets

- An important tool to help private school authorities focus on improving education.
- Current performance is used to set the target to be achieved by the end of the next three-year plan.
- Targets are expressed in quantitative terms, e.g., "by 2002, 80 per cent of students..." and are an improvement over the current level of performance.
- In the three-year plan for 1998/1999 to 2000/2001 and each year thereafter, private schools must specify targets for improvement to be met by the end of the plan period for all provincial achievement tests and diploma examinations that are applicable to the grade levels/courses offered in their school.
- Targets are optional for all other performance measures.
- When setting targets, consideration needs to be given to the circumstances that affect the performance of students.
- Targets should be set in consultation with staff, parents, parent groups, and the school community.
- (See Appendix 2, pages 24-25, for more information on target setting.)

Strategies

- Actions designed to achieve required provincial goals and results and any local goals and results included in the plan.
- Are expressed in action-oriented terms, e.g., "develop...", "implement...", "assist...", "work with...".
- Developed by the private school to address priorities, improvement areas, learning needs of specific groups of students, and local issues, trends and opportunities.
- Strategies do not need a corresponding performance measure.

Budget Information

Link between planning and budgeting

The budget for the private school is developed to support the plan. A budget summary must be included in your plan. Summary budget information should:

- Highlight allocations to major initiatives in the plan.
- Highlight spending priorities.

Capital Projects (Optional)

Facilities planning

Providing adequate facilities for your students is a necessary condition for operating your school. A key element of planning is to determine if the school's facilities need upgrading, expanding or relocating.

Facilities information in the private school education plan should briefly describe any major projects planned or underway during the three-year time horizon of the plan that is of vital interest to parents and other members of your school's community. Budget information for capital projects does not need to be included unless the school wishes to do so.

Required Goals, Results and Performance Measures for Private School Plans

The tables on the following pages list the provincially required goals, results, and performance measures for private school education plans. These tables can, but do not have to be used as a template for the goals, results, measures and strategies section of your school's three-year plan.

Goal 1 Education is focused on what students need to learn, and students achieve high standards.

Goal Statement Adapted for School _

Results

Required:

- Students achieve provincial and national learning standards.
- Students acquire the education they need to prepare them for work, further studies and citizenship.

Other:

Performance Measures

Required:

- Percentage of students who achieve the acceptable standard and percentage of students who achieve the standard of excellence on provincial achievement tests (five years of results), based on the total number of students writing, and target for 2001 (new requirement) for each test.¹
- Percentage of students who achieve the acceptable standard and the percentage who achieve the standard of excellence on diploma exams (five years of results) and target for 2001 (new requirement) for each exam.²
- Participation rate: percentage of students in grades 3, 6 and 9 who wrote provincial achievement tests.³
- High school graduation rate as determined by the private school [applies to private schools with high school programs] (change).⁴
- Percentage of parents who are satisfied with the quality of their children's education.
- Percentage of students who are satisfied with:
 - their school overall;
 - variety and challenge in classroom and school activities.
- Percentage of students in early literacy programs in ECS to grade 2 who are reading at grade level at the end of the school year, as determined by teachers (new requirement).⁶

Other:

Strategies (required)

Private schools must include their strategies for achieving this goal and related results.

- Student Evaluation Branch provides achievement test results to private schools. Include this measure for grades (3, 6, or 9) offered by your school.
- Student Evaluation Branch provides diploma exam results to private schools with high school programs; include the measure for each diploma course your school offers.
- Student Evaluation Branch provides achievement test participation information for grades 3, 6 and 9 to private schools for reporting in the AERR.
- Applies to private schools with high school programs. This measure was changed to be more relevant to private schools as a result of the review of private school AERRs and discussions with private school representatives.
- Applies to private schools with high school students.
- Include if your school has ECS to grade 2 students in early literacy programs. When the number of students in the program is small, it may be more meaningful to report the number of students at grade level out of the total number of students in these programs. If there are fewer than five students, information is not reported to protect the identity of individuals (see Policy 2.1.3, *Use and Reporting of Results on Provincial Assessments, Policy, Regulations and Forms Manual*, April 1997). This restriction to reporting information applies to all provincial and school performance measures.

Goal 2 Education in Alberta is responsive to students, parents and communities (new requirement).		
Goal Statement Adapted for School		
Results	Performance Measures	
Required (new):	Required (new):	
 Parents and the school community have appropriate roles in education. 	Percentage of parents satisfied that the school is responsive to their concerns about their child's education.	
All schools are safe and caring.	Other:	
Other:		
Strategies (required)		
Private schools must include their strate	egies for achieving this goal and related results.	
	he support services they require (required for designated schools; optional in 1998 for other private schools).	
Goal Statement Adapted for School		
Results	Performance Measures	
Required:	Required (new):	
Services for children with special needs are co-ordinated at the	Percentage of parents of students with special needs (mild, moderate, severe, gifted) satisfied with:	
school level.	 access to services for child with special needs; progress and achievement of their child with special needs. 	
Other:	[Where student numbers are small, private schools may develop a local indicator to measure or describe this result.]	
	Other:	
Strategies (required)		
Private schools including this goal must	indicate their strategies for achieving this goal and related results	

Note: During 1998/1999 Alberta Education, AISCA and private school representatives will work together to enable all private schools with students with special needs to include Goal 3 in their plans starting in 1999.

Goal 4 Teaching in Alberta consi	stently is of high quality.
Goal Statement Adapted for School	
Results	Performance Measures
Required:	Required:
 Teachers' professional growth focuses on the knowledge, skills and attributes required to meet 	Private schools are required to identify at least one measure they will use to assess and report on these results.
the diverse learning needs of all students.	[A measure from the provincial education plan can be used or adapted, or private schools may develop their own.]
 Teachers help students achieve provincial learning expectations and high standards. 	
Other:	Other:
Strategies (required)	
	egies for achieving this goal and related results. integrated into education to enhance student learning, and
increase efficiency and fle Goal Statement Adapted for School	
Results	Performance Measures
Required:	Required:
Students have information technology skills needed for K-12 learning, work and post-	Percentage of students satisfied that they have the skills to use information technology.
secondary studies.*	[Private schools providing secondary programs include this measure. Other private schools may adapt this measure or identify
Optional:	a different measure for the result.]
* Information technology expands choice and flexibility in what, when, where and how students learn.	
* Teachers are able to integrate information technology into instruction and the management of student learning.	
Other:	Other:
Strategies (required)	

Private schools must include the strategies adopted for achieving this goal and related results.

Related to Information and Communication Technology Program of Studies which is currently available for implementation. Province-wide implementation is required by September 2000. Note: Funded, accredited private schools are eligible to apply on a yearly basis for used computers, computer equipment, and software at no cost through the Computers in Schools Program. For more information, visit the Alberta Education website: http://ednet.edc.gov.ab.ca. and click on the technology heading. You may also contact Bonnie Brooks of the School Technology Task Group by phone (403) 427-9001 or fax (403) 415-1091. To be connected toll-free from outside Edmonton, dial 310-0000.

Goal 7 The education system is of resources.	open and accountable for the achievement of results and use
Goal Statement Adapted for School information available to parents and its	(may be adapted to reflect the private school's intent to make defined community).
Results	Performance Measures
Required:	Required:
 Parents and the school community have timely and meaningful information about education, including student achievement and expenditures, from the private school. 	Percentage of parents satisfied with their access to and the quality of school information about their child's progress and achievement.
	Percentage of private school spending on instruction and on administration.
	Spending per student per school year (see page 21 for instructions on calculating per-student spending).
Other:	Other:

Strategies (required)

Private schools must include their strategies for achieving this goal and related results.

ANNUAL EDUCATION RESULTS REPORTS

AERR - a key component of accountability

The Annual Education Results Report (AERR) is a brief, concise document that highlights progress, accomplishments and results achieved in the past year as a result of implementing the private school education plan. Reporting results achieved is essential for accountability. The AERR shows where performance is strong and identifies areas needing improvement to be addressed in upcoming three-year education plans.

The elements to be included in the private school AERR are listed and explained below.

Elements

Statement of Responsibility

- Confirms the AERR was prepared in accordance with legislative authority and provincial requirements.
- Indicates commitment to use results in planning and to take action to make improvements in areas where results do not meet expectations.
- Is signed by the chairman of the private school's governing society or organization.
- See Appendix 4, page 27, for sample statement of responsibility for the AERR.

Contextual Information (new requirement for AERR starting November 1999)

- Briefly explains the context in which results were achieved, including a brief profile of the private school (e.g., location, characteristics of student body and school community, total enrolment, grades offered, special emphasis of school).
- Identifies the circumstances affecting results achieved.
- Explains any difference between intended results and results achieved (actual performance).
- Does not have to be a separate section; this information can be integrated throughout the report.

Progress and Accomplishments

- Summarizes the implementation of the strategies in your school's three-year plan over the past school year and other accomplishments of your private school.
- Indicates progress made in provincial and your school's improvement areas.
- Starting with the November 1999 AERR, the report includes a brief description of the programs provided for specific groups of students (if applicable) and their effectiveness, e.g., programs for:
 - students with special needs (mild, moderate, severe, gifted),
 - home education students,
 - students in early literacy programs,
 - other students at risk of falling behind (e.g., disadvantaged students, students whose first language is other than the language of instruction).

Information on Local and Provincial Performance Measures

- Reports data on the performance measures listed in your school's three-year education plan, including trends over time (if available).
- Includes a brief overall assessment of progress and achievement for each provincial and school goal, e.g., results are satisfactory, exceed expectations or need improvement.
- Reports progress in relation to targets for performance measures where targets have been set.
- Compares local results with provincial standards for student achievement on provincial tests and diploma examinations.
- If your school offers grades 3, 6 or 9, the 1998 AERR (for school year 1997/1998) must report:
 - achievement test results from 1995 (the year annual testing in all subjects started, or from the first year administered by the private school if later than 1995) to 1998 inclusive, and
 - achievement test results in relation to provincial standards.

- If your school offers grade 12, the 1998 AERR (for school year 1997/1998) must report:
 - diploma exam results for five years, starting with 1994, or from the first year administered by the private school if administered for the first time after 1994, and
 - diploma exam results in relation to provincial standards.
- Used to identify in your report the priority areas of improvement to be addressed in the next update of your school's three-year plan.
- Note and briefly explain any deletions or substitutions of local measures in results reporting.

Note: You may find that information for some local measures in your plan is too costly to gather or is not meaningful. You can drop or replace these measures in the next plan and indicate the disposition of these measures in your school's AERR. If better measures have already been developed and information on them is available, you can include the information on these new measures in the AERR instead.

Conducting Surveys

Some designated and local measures require surveys of parents, students, staff and other community members.

To be manageable, surveys can be conducted every two to three years or rotated among client and stakeholder groups over a three-year period.

If private schools use the same questions as are used in Alberta Education's annual surveys of a stratified random sample of parents, students and the public, local results can be considered in relation to provincial results. The results of private school surveys are not directly comparable to provincial survey results because of survey timing and other major methodological differences.

While surveys do not have to be conducted annually, the latest available survey information should be reported in your school's AERR each year.

Two resources were prepared for Alberta Education in 1995 to help school authorities conduct satisfaction surveys:

- Environics West, Pilot Project Report: This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, selfadministered questionnaires (http://www.edc.gov.ab.ca/educationsystem/).
- Environics West, Telephone and Self-Completed Satisfaction Surveys: Training Manual: This manual provides advice on selecting samples and conducting telephone and mailed surveys (http://www.edc.gov.ab.ca/educationsystem/).

The questions asked in Alberta Education's 1998 survey of students, parents and the public are also available on Ednet (http://www.edc.gov.ab.ca/educationsystem/).

Financial Summary

- Summarizes private school authority spending for the previous school year based on the Audited Financial Statement.
- Is concise and easily understood by parents and members of the community; this can be in graph or table form (e.g., the pie diagram in the provincial three-year plan for education).
- Indicates where and how detailed budget and expenditure information may be obtained.

Capital Projects (Optional)

 Reports on facility improvements underway or completed during the year. Expenditure information on capital projects does not need to be provided unless the school wishes to do so.

SUMMARY OF REPORTING REQUIREMENTS, 1998 AND 1999

	November 1998 AERR	November 1999 AERR
•	Reports on the <u>November 1997</u> private school three-year education plan for <u>1997/1998 to 1999/2000</u> .	Reports on the <u>November 1998</u> private school three-year education plan for <u>1998/1999 to 2000/2001</u> .
•	Statement of Responsibility.	Same.
•	Contextual information optional.	Contextual information <u>required</u> .
•	Progress and Accomplishments - Highlights of progress made on implementing the plan and achieving provincial and local improvement areas during 1997/1998.	Progress and Accomplishments Same for 1998/1999. Programs provided and their effectiveness for specific groups of students including: special education (mild, moderate, severe, gifted), home education students, students in early literacy programs, other students at risk of falling behind (e.g., disadvantaged students, students whose first language is other than the language of instruction).
•	 Results achieved for provincial and local goals. Overall assessment of progress in each goal area, based on performance measures information. Reports on information on required (see next page) and local performance measures listed in the November 1997 private school plan. Reports performance in relation to any targets set. Notes any changes in measures between the November 1997 plan and information reported in November 1998. 	Results achieved for provincial and local goals. Same. Reports information on required (see next page) and local performance measures listed in the November 1998 private school plan. Reports performance in relation to targets set for student achievement on provincial achievement tests, diploma exams, and for any local targets. Notes any changes in measures between the November 1998 plan and information reported in November 1999.
•	 Financial Summary Summary of expenditures for the school year just completed based on the AFS. Indicates where and how detailed budget and expenditure information may be obtained. 	Financial Summary Same. - Same.

REQUIRED PERFORMANCE MEASURES, 1998 AND 1999

	November 1998 AERR	November 1999 AERR
Go	pal 1:	Goal 1:
•	Percentage of students who achieve the acceptable standard and percentage of students who achieve the standard of excellence on provincial achievement tests (four years of results or all available years if school has been in operation for less than four years), based on per cent who wrote.	Five years (or all available years if school has been operating fewer than five years) of results for both achievement tests and diploma examinations in relation to provincial standards and school targets set for 2001, based on per cent who wrote.
•	Percentage of students who achieve the acceptable standard and the percentage who achieve the standard of excellence on diploma exams (five years of results or all available years if school has been operating less than five years). [School marks or final marks also may be reported.]	See above.
•	Participation rates: percentage of students in grades 3, 6 or 9 who wrote provincial achievement tests and student participation in diploma courses.	Same.
•	(Change) High school graduation rate as determined by the private school [applies to private schools with high school programs].	Same.
•	Percentage of parents who are satisfied with the quality of their children's education.	Same.
•	Percentage of students who are satisfied with:	Same.
	- their school overall;	
	 variety and challenge in classroom and school activities. 	
		Percentage of students in early literacy programs in ECS to grade 2 who are reading at grade level (grade 1 or 2) at the end of the school year (as determined by teachers). [Note: when the number of students in the program is small, reporting the number at grade level out of the total number in the program may be more meaningful. If the number is smaller than five, however, this information is not reported to protect individual identity.]

November 1998 AERR	November 1999 AERR
 Goal 2: Report on measures in the November 1997 plan for this goal if your plan included this goal. 	Goal 2: Percentage of parents satisfied with their opportunities for involvement in decisions affecting education in their child's school.
Goal 3: Report on measures identified for this goal in your November 1997 plan [applies to designated special education private schools and other private schools that included this goal in their November 1997 plan].	Goal 3: Same for November 1998 plan.
 Goal 4: Report on measures included in the November 1997 plan for this goal. 	Goal 4: Same for November 1998 plan.
Percentage of students satisfied with their opportunity to learn about technology and with their skill levels in: spreadsheets word processing network communications [Applies to secondary students; elementary schools report on the measure developed by the school for this goal.]	 Goal 5: Percentage of students satisfied that they have the skills to use information technology [applies to private schools with secondary level students] or School developed measure for this goal [applies to elementary schools].
 Goal 7: Percentage of parents who are satisfied with their access to and the quality of information about their children's progress and achievement from the school. Percentage of private school spending on instruction and administration. Spending per student per school year. For consistent reporting of per student spending among private schools in Alberta, divide total expenditures for the year (AFS Schedule 1) by total FTE enrolment. Calculate FTE enrolment by adding September 30 actuals (BR Schedule 7) total enrolled students grades 1-12 (column 8) and FTE enrolment in ECS (column 12). 	Goal 7: Same. Same. Same.



Basic Education in Alberta - the Definition Ministerial Order No. 004/98

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.

- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.
- Research an issue thoroughly and evaluate the credibility and reliability of information sources.
- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.
- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

Standards for Student Learning

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

Education Delivery

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

[Note: The above definition of basic education is the update and replacement for the Ministerial Order referred to in Procedure 2 of the Private School Policy, *Policy, Regulations and Forms Manual,* Alberta Education, April 1997. This Ministerial Order applies to funded, accredited private schools that offer a complete elementary, junior high and/or senior high school program.]

Setting Local Targets for Student Achievement

Targets and Planning

A target is an implicit part of any goal. While a school's or school authority's educational goals point out the directions for people's efforts, targets describe in specific terms what will be accomplished by a certain time. This allows people to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding the school's or school authority's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of your school or school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past accomplishments are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma exam results, as well as results of various other local assessments, are relevant in target setting.

Local Focus

Targets for student achievement on the provincial achievement tests and diploma exams are a required part of school and school authority education plans. In the case of school boards, district targets provide a framework for each school in the jurisdiction to use in setting targets. District targets will be most helpful if they reflect the variations identified in local target setting from school to school.

Systematic interpretation of school results from provincial achievement tests and diploma exams will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting district and school targets for student performance on provincial assessments for the next year or two. While the provincial expectation, that at least 85 per cent of students will achieve the acceptable standard on each test or exam, indicates the long-term goal. staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test or exam in a given year. An important part of this decision is agreeing on how resources and people can support the priorities and targets which have been set locally.

Tips for Setting Local Targets

- Consider past and desired participation rates in achievement tests and diploma exams when setting targets for student performance on specific tests or exams.
- Focus on a limited number of areas. For example, emphasize one or two subjects in which there are weaknesses in student performance across grades. It may be reasonable to set "hold the line" targets in other areas temporarily.
- Set targets in relation to other targets. It is important to ensure that the achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests and diploma exams should not decrease because of a desire to improve school or jurisdiction results.
- Work collaboratively across grades in a school. Students' performance on an achievement test or diploma exam reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.
- Use the school reports on achievement test or diploma exam results to identify what aspects of a subject or course need attention, and use this information to plan targets.

- Emphasize what students need in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- In the case of school boards, work collaboratively at the district level to identify areas of common strength or weakness across different schools and to determine targets for the district that can encourage all schools.
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

Targets in Perspective

Provincial tests, though providing a common standard and important information about students' learning, are only one of many indicators that must be used to evaluate the effectiveness of schools. School authorities and individual schools may find it helpful to set targets related to other measures of student achievement, and to areas other than student achievement. Examples include completion of programs, satisfaction reported by students or parents, collaboration of parents or others from the community, student involvement in the community, and other types of indicators reflecting local education goals.

Through its targets, each school authority or school, together with parents and members of the community, can highlight priorities that exist locally for a given year and commit to achieving certain results. Insofar as target setting complements other strategies for improving student learning, your targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

Revised, June 1998

Advice on School Authority Performance Measurement in Alberta

Background

Performance measurement is a challenging and critically important aspect of implementing the Accountability Framework for continuous improvement in Alberta's education system.

School authorities are required to list in their three-year plans the performance measures they will report on in their annual education results reports. Performance measures ensure a focus on outcomes so that:

- those involved in education have information on results achieved to use to improve education, and
- parents and the community have information on results achieved with the investment of resources in education.

Purpose of Performance Measures

Selecting appropriate performance measures is key to obtaining useful information and making improvements in education. School authorities develop and use performance measures to:

- assess and report annually on achievement of results to parents, their community, and government:
- identify strengths, weaknesses and areas for improvement; and
- assist in decision making such as selecting priorities, developing improvement plans, allocating resources, setting improvement targets, and implementing initiatives and programs.

Tips about Performance Measures

Limit the number of measures for each result and focus on obtaining useful information. "It's impossible to measure everything, and as important as measuring results is, it cannot become such a large and expensive task that we lose sight of the objective." (Government of Alberta, *Measuring Up*, 1996).

- Develop a set of measures that balances student, financial, satisfaction, and other performance information.
- Differentiate between a result and a measure.
 A result is a specific outcome of achieving a goal. A measure helps to assess whether the result is being achieved. For example, if the result is improved secondary student achievement in specific subjects, a possible measure might be "the percentage of junior and senior high teachers who teach in their areas of specialization."
- Select measures that provide quantitative information - e.g., "the percentage of teachers who use computers or Internet resources in the classroom" instead of "integration of computers and Internet into the classroom."
- Report performance in relation to a total number. Measures that are in the form of a ratio (percentages or rates) provide an important context for assessing performance e.g., "the number of students who participate in school-sponsored extra-curricular activities" is more meaningful with the addition of "out of the total number of students" or stated as "the percentage of students who participate in"
- Identify measures that can be assessed at regular intervals to provide comparable trend data over time.
- Select measures and develop data definitions carefully so they will be appropriate over the longer term. Changing measures or data definitions interrupts trend lines.
- Develop appropriate questions for satisfaction measures to obtain useful information.
 Questions on the same topic often need to be worded slightly differently for each respondent group. For example, high school students might be asked, "Are you satisfied with the range of courses and programs available in your school?" and parents might be asked "Are you satisfied with the choice of courses and programs for your child?"

Examples of performance measures are available on Ednet at:

(http://ednet.edc.gov.ab.ca/educationsystem/measurebank97/mbank97.htm).

Sample Statements of Responsibility

Statement of Responsibility for Private School Three-Year Plans:

"The Education Plan for the three years commencing the school year of (day-month-year), was prepared under the direction of the (name of private school authority) in accordance with the responsibilities specified in the School Act, the Government Accountability Act, the School Authority Accountability Policy and the provincial government's accounting policies.

The priorities outlined in this Education Plan were developed in the context of the provincial government's business and fiscal plans. The (name of private school authority) is committed to achieving the planned results laid out in this plan."

(To be signed by the private school authority chair.)

Statement of Responsibility for Private School Annual Education Results Reports (AERRs)

The Annual Education Results Report for the (year) school year was prepared under the direction of the (name of private school authority) in accordance with the responsibilities specified in the School Act, the Government Accountability Act, the School Authority Accountability Policy and the provincial government's accounting policies.

The education results are used to the best of our abilities to develop three-year education plans to ensure that all students have the opportunity to acquire the knowledge, skills and attitudes needed to be self-reliant, responsible, caring and contributing members of society.

(To be signed by the private school authority chair.)

Glossary

Goals

 Broad statements of desired condition or aims to be attained over the long term in order to realize an organization's vision.

Issues

 An existing or emerging condition which, if left unaddressed, could interfere with ability to fulfill a mandate or achieve goals.

Mission

 A brief statement of an organization's overall purpose and role.

Performance Measures

- Provide information that can be used to describe and assess the progress toward achieving goals and results. This information is sometimes called "results" or "results information" (see below).
- Are expressed in quantifiable terms, e.g., "number of...", "percentage of ...".

Principles and Beliefs

- Reflect the values of the organization/school.
- Serve to guide decision making and assist in the development of mission, vision, and goals.

Profile

 Provides a brief description of the school and the community it serves (e.g., philosophy or focus, student characteristics, programs, location).

Results

 Results are intended outcomes of achieving the goals of the plan that address the question, "What will this look like when we get to where we want to be?"

Are expressions of expected or desired outcome, e.g., "students achieve...", "teachers use..."; not to be confused with performance measures information (see above).

Strategies

- Actions used in the short to medium term (one to five years) to achieve goals and desired results.
- Are expressed in action-oriented terms, e.g., "develop...", "implement...", "assist...", "work with...".

Targets

 A desired level of performance which typically involves some increment of improvement over the current state.

Targets are an important tool to help school authorities and schools focus on improving education.

 Are expressed in quantitative terms, e.g., by "2002, 80 per cent of students...".

Trends

 Trends are directions of data established over time that may show increases, decreases, or no change (e.g., enrolments over time, student achievement over time).

Trend information is useful input for decision making, including planning, budgeting, implementing, assessing and reporting.

Vision

- A description of the fundamental characteristics of education that school authorities and schools are committed to achieving.
- Describes what the school or jurisdiction wants to become, what students will have achieved, and what services and programs for students will be like over the longer term.
- An ideal to strive for; sometimes called a preferred future.

List of Source Documents

- Accountability in Education: Policy Framework (June 1995)
- Policy, Regulations and Forms Manual (April 1997)
- Meeting the Challenge Third Annual Results Report on Education: ECS to Grade 12 (1997)
- First things first ... our children: The Government of Alberta's Three-Year Plan for Education, 1998/1999 to 2000/2001
- Pilot Project Report, Environics West, 1995
- Telephone and Self-Completed Satisfaction Surveys: Training Manual, Environics West, 1995

Internet: http://www.edc.gov.ab.ca/department/ Available from the Planning Branch, Alberta Education

Phone: (403) 427-8217* Fax: (403) 422-5255

- Audited Financial Statements (AFS) and Guidelines
- Budget Report (BR) and Guidelines, 1998/1999

Available from the School Business and Legislative Services Branch, Alberta Education Phone: (403) 427-7235*

Fax: (403) 427-5930

• First things first ... our children: Agenda for Opportunity, January 1998

Available from the Communications Branch, Alberta Education

Phone: (403) 427-2285* Fax: (403) 427-0591

 Funding Manual for School Authorities in the 1998/1999 School Year

Internet:

http://ednet.edc.gov.ab.ca/funding
Available from the School Finance Branch,

Alberta Education Phone: (403) 427-2055* Fax: (403) 427-2147

- Government Accountability Act (Statutes of Alberta, 1995, Chapter G-5.5)
- School Act, (Statutes of Alberta, 1988, Chapter S-3.1, as amended)

Available from the Queen's Printer Bookstore: Edmonton

Phone: (403) 427-4952* Fax: (403) 452-0668 Calgary Phone: (403) 297-6251

Phone: (403) 297-6251 Fax: (403) 297-8450

Government Accountability (October 1994)

Available from the Auditor General's Office Phone: (403) 427-4222* Fax: (403) 422-9555

- Guidelines for Interpreting and Using the Results of the Diploma Examinations, August 1997
- Guidelines for Interpreting and Using the Results of the 1997 Achievement Tests

Internet: http://www.edc.gov.ab.ca/department/ Updated annually and provided with school and jurisdiction reports; also available from the Student Evaluation Branch, Alberta Education Phone: (403) 427-0010*

Fax: (403) 422-4200

Management Information Reporting Schedules

Available from the Regional Office Branch, Alberta Education Phone: (403) 427-2952*

Fax: (403) 422-9682

 Setting a New Framework: Report and Recommendations of the Private Schools Funding Task Force (February 1998)

Available from the Communications Branch, Alberta Education

Phone: (403) 427-2285* Fax: (403) 427-0591

* To be connected toll-free from outside Edmonton, dial 310-0000.

Feedback Form / Comments

Please tell us what you think about the planning and reporting process and the *Guide for Private School Authority Planning and Reporting*. Comments will be used to improve the planning and reporting process and future information provided to private school authorities on plans and reports.

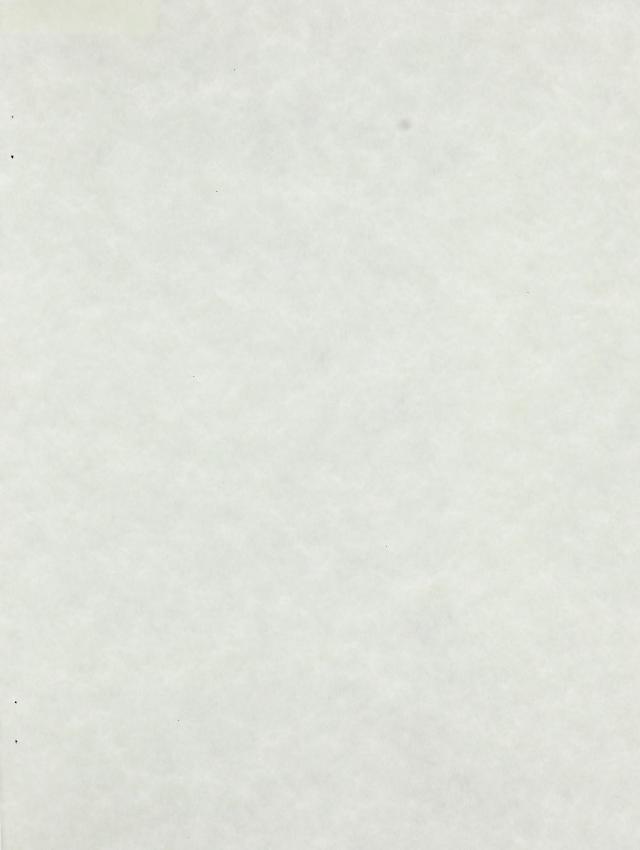
1.	Planni	ng and Reporting Process
	a)	What concerns do you have about the planning and reporting process?
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	b)	How can the planning and reporting process be improved?
2.	Guide	for Private School Authority Planning and Reporting
	a)	What did you find helpful about the Guide?
	b)	What concerns do you have about the <i>Guide</i> ?
	c)	What changes would you suggest for the <i>Guide</i> ?

Please send your comments by mail, e-mail or fax to: Planning Branch, Alberta Education 11160 Jasper Avenue Edmonton, Alberta T5K 0L2 Fax (403) 422-5255, Phone (403) 427-8217 Internet: http://ednet.edc.gov.ab.ca

E-mail: askEd.plan@edc.gov.ab.ca

Return Address:

Planning Branch Alberta Education 11160 Jasper Avenue Edmonton, Alberta T5K 0L2



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